

Probate Notes for April 20, 2007

Probate notes are a recommendation as to the outcome of the petition. Unlike tentative rulings, they do not automatically become adopted as the order of the court. If you wish to have your petition preapproved or would like to continue the matter to cure defects, contact the probate examiner at (530) 406-6718 between the hours of 2 p.m. and 4 p.m.

Case: Estate of Chavez
Case No. CV PB 03-310

The following problems are noted:

1. Schedule C, Receipts, may not include transfers. The 2/05/07 entry of \$20.00 and the 2/07/07 entry of \$163,000.00 are erroneously included in Receipts.
2. Schedule E, Disbursements, may not include transfers. The 12/10/03 entry of \$1,000.00 is erroneously included in Disbursements.
3. Schedule G is required to state the date that the assets on hand are valued, but no date is stated.
4. Schedule I states the assets as of date of death to be \$662,845.37. However, the total of the two filed Inventories is \$1,013,253 (\$661,000 plus \$352,253). Schedule I omits two of the inventoried bank accounts. Petitioner must inventory all date of death assets, so that Schedule I matches the filed inventories.
5. Several entries under Disbursements state "unknown" and need further explanation.
6. Also, the proof of service attached to the Amended Account is incorrect as it refers to some other petition and party.